



California Energy Commission

Technology Transfer for EPIC Research Projects – Request for Proposals (RFP-18-802)

Pre-Application Workshop

Energy Deployment & Market Facilitation Office
Energy Research and Development Division
California Energy Commission
October 10, 2018





Housekeeping

- ▶ In case of emergency
- ▶ Facilities
- ▶ Sign-in sheet
- ▶ WebEx recording
- ▶ Updates on solicitation documents and today's presentation will be posted at:
<http://www.energy.ca.gov/contracts/epic.html#RFP-18-802>



Agenda

Time	Topic
10:00 am	Welcome and Introductions <ul style="list-style-type: none">▶ Commitment to Diversity▶ EPIC Background▶ Purpose of the RFP▶ Key Dates
10:10 am	Scope of Work and Application Requirements <ul style="list-style-type: none">▶ Parts of the RFP▶ Changes from Previous RFP▶ Administrative and Technical Requirements▶ Technical Scoring Scale
10:40 am	Connecting with the Energy Commission <ul style="list-style-type: none">▶ LinkedIn Networking Webinar
10:45 am	Questions and Answers
11:00 am	Adjourn



Commitment to Diversity

The Energy Commission adopted a formal resolution strengthening its commitment to diversity in our funding programs. We continue to encourage disadvantaged and underrepresented businesses and communities to engage in and benefit from our many programs.

To meet this commitment, Energy Commission staff conducts outreach efforts and activities to:

- ▶ Engage with disadvantaged and underrepresented groups throughout the state.
- ▶ Notify potential new applicants about the Energy Commission's funding opportunities.
- ▶ Assist applicants in understanding how to apply for funding from the Energy Commission's programs.
- ▶ Survey participants to measure progress in diversity outreach efforts.



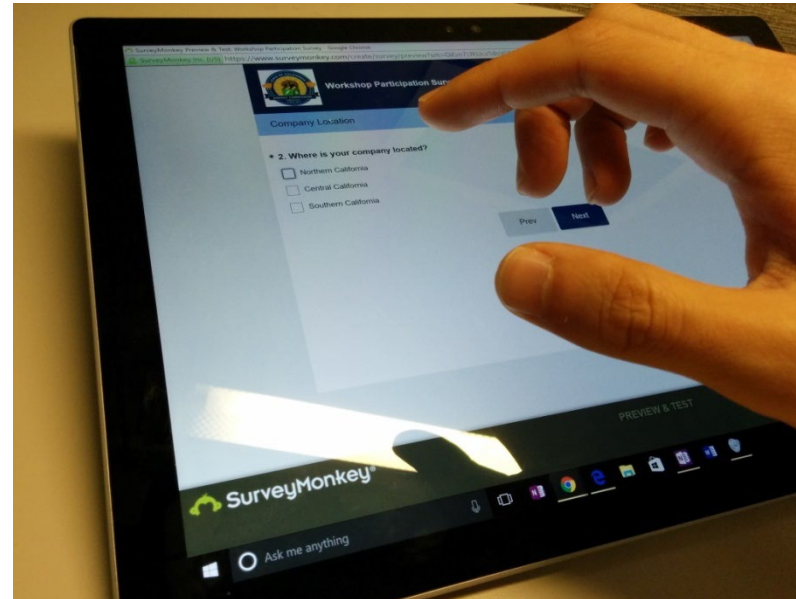
We Want to Hear From You!

1-Minute Survey

The information supplied will be used for public reporting purposes to display anonymous overall attendance of diverse groups.

- ▶ In person: iPads are being passed around the room
- ▶ WebEx:
<https://www.surveymonkey.com/r/CEC-10-10-2018>

Thank you for your time!





EPIC Background

- ▶ The Electric Program Investment Charge (EPIC) is funded by an electricity ratepayer surcharge established in 2011 by the California Public Utilities Commission.
- ▶ Benefits ratepayers of state's electric investor-owned utilities (PG&E, SCE, and SDG&E).
- ▶ Funds clean energy technology projects: greater electricity reliability, lower costs, and increased safety.
- ▶ Projects must lead to technological advancement and breakthroughs to overcome barriers that prevent the achievement of the state's statutory energy goals.



EPIC Background

- ▶ Established to fund investments to advance clean energy technologies and approaches for the benefit of investor-owned utility electricity ratepayers.
- ▶ EPIC creates new energy solutions, fosters regional innovation, and brings clean energy ideas to the marketplace:





Eligibility

- ▶ This RFP is open to public and private entities and individuals, except publicly owned utilities.
- ▶ Bidders must accept the terms and conditions listed in the RFP.
- ▶ Bidders are required to register with the California Secretary of State and be in good standing to enter into an agreement with the Energy Commission. <http://www.sos.ca.gov>



Purpose of the RFP

To select a contractor that will provide technology transfer services and expertise to effectively disseminate the results of EPIC research projects.

Available funding:

- ▶ Up to **\$3.8 million**
- ▶ Minimum funding amount of \$3.3 million



Key Dates

Activity	Date
RFP Release	September 25, 2018
Pre-Bid Conference	October 10, 2018
<u>DEADLINE FOR WRITTEN QUESTIONS</u>	<u>October 12, 2018</u>
LinkedIn Networking Webinar	October 16, 2018
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<u>DEADLINE TO SUBMIT PROPOSALS</u>	<u>November 2, 2018</u>
Anticipated Notice of Proposed Award (NOPA)	Week of November 26, 2018
Anticipated Energy Commission Business Meeting Date	January 9, 2019
Anticipated Agreement Start Date	February 2019
Anticipated Agreement Termination Date	March 31, 2022



Problem Statement

Research results need to be disseminated to energy stakeholders, including:

- ▶ Investors
- ▶ Technology developers
- ▶ Customers
- ▶ Local governments
- ▶ Policymakers

Requiring expertise in:

- ▶ Energy sector
- ▶ Developing web materials
- ▶ Conducting forums

Parts of the RFP

Contract Agreement Management

Digital Technology Transfer
Strategy for EPIC

Plan, Produce, and Manage
Nine Forums Across California

Plan, Produce, and Manage
Two EPIC Symposiums



Task 1 – Contract Agreement Management

This task outlines administrative duties:

- ▶ Invoices
- ▶ Progress Reports
- ▶ Meetings (Kickoff, TAC, CPR, Final)
- ▶ Final Report
- ▶ Managing subcontractors and match funding



Task 2 – Digital Technology Transfer Strategy for EPIC

The goal of this task is to develop and implement a digital technology transfer strategy, including:

- ▶ Upgrading the [Energy Innovation Showcase](#) to serve as the central hub for technology transfer materials.
- ▶ Creating a portal for EPIC recipients to submit content.
- ▶ Curating and pushing content to users based on their areas of interest (e.g. technology topic, geographic location).



Task 2 – Digital Technology Transfer Strategy for EPIC

Key deliverables:

- ▶ Digital Technology Transfer Strategy
- ▶ Email Content Update Template
- ▶ Test/Live EPIC Recipient Portal
- ▶ Featured Graphics for Technology Topic Pages
- ▶ Test/Live Upgraded Energy Innovation Showcase



Task 2 – Digital Technology Transfer Strategy for EPIC

Changes from original solicitation:

- ▶ Removed video, podcast, and blog content subtasks.
- ▶ Added EPIC Recipient Portal deliverable.
- ▶ Increased focus on upgrading Energy Innovation Showcase to create an effective digital technology transfer platform.



Task 3 – Plan, Produce, and Manage Nine Forums Across California

Three forums annually:

- ▶ One-day gatherings
- ▶ 200-300 attendees each
- ▶ topic or set of topics with regional relevance

Examples of potential forum topics include:

- ▶ Energy efficiency opportunities in California's existing commercial and multi-family buildings.
- ▶ Development of zero-net energy buildings in disadvantaged communities.
- ▶ Strategies to commercialize microgrids.



Task 3 – Plan, Produce, and Manage Nine Forums Across California

Key deliverables:

- ▶ Lists identifying potential forum topics, venues, speakers, etc.
- ▶ Outreach content including:
 - ▶ Email “save the date” announcements
 - ▶ Email invitations
- ▶ Printed programs for each forum
- ▶ Day-of event coordination
- ▶ Post-event surveys



Task 3 – Plan, Produce, and Manage Nine Forums Across California

Changes from original solicitation:

- ▶ Removed 2018 forum due to timing of new RFP.
- ▶ Increased detail about expectations for the forums based on questions and answers from the original RFP.
- ▶ Removed Media Plan deliverable, which included writing news releases, media advisories, and interviews with speakers.
- ▶ Removed photography deliverables.
- ▶ Increased emphasis on technology transfer.



Task 4 – Plan, Produce, and Manage Two EPIC Symposiums

One EPIC Symposium per year in 2020 and 2021:

- ▶ One-day events
- ▶ 700-1000 attendees each
- ▶ Multiple concurrent sessions

The EPIC Symposium:

- ▶ Showcases EPIC-funded efforts and technologies;
- ▶ Facilitates communication, collaboration, and information sharing among stakeholders;
- ▶ Builds awareness of the Energy Commission's investments in innovation.



Task 4 – Plan, Produce, and Manage Two EPIC Symposiums

Key deliverables:

- ▶ Lists identifying potential symposium venues, topics and tracks, keynote speakers, panelists, etc.
- ▶ Outreach content including:
 - ▶ Email “save the date” announcements
 - ▶ Email invitations
- ▶ Interactive online agenda
- ▶ Organization of a poster session and a networking event
- ▶ Printed programs for each symposium
- ▶ Day-of event coordination
- ▶ Post-event surveys
- ▶ Promotional video featuring highlights of each symposium



Task 4 – Plan, Produce, and Manage Two EPIC Symposiums

Changes from original solicitation:

- ▶ Removed 2019 EPIC Symposium due to timing of new RFP. (Symposium will be planned and managed by the Energy Commission, to be held on February 19th, 2019 at the Sacramento Convention Center)
- ▶ Increased detail about expectations for the Symposium based on questions and answers from the original RFP and staff experience with the 2018 EPIC Symposium.
- ▶ Removed Media Plan deliverable, which included writing news releases, media advisories, and interviews with speakers.
- ▶ Removed photography deliverables.
- ▶ Removed promotional blog posts deliverables.
- ▶ Removed mobile phone application.
- ▶ Removed video deliverables, except for the Promotional Symposium Videos and livestream content.



Additional Notes

- ▶ **Budget:** Bidders must allocate \$300,000 in the budget to costs related to the rental of venues, audio/visual equipment, staging supplies, and facility requirements. (See budget attachment)
- ▶ **Retention:** Equipment, materials and miscellaneous costs such as meeting costs, facility rental and other costs for staging public events will not be included in calculating retention.
- ▶ **Food and non-alcoholic beverages:** EPIC funds shall not be used to purchase food or beverages. Bidders may consider using match funds for these expenses.
- ▶ **Printing services:** A State Agency must offer a printing job first to the Office of State Publishing. Bidders may include printing costs in their proposals, and the funds will be used for printing if the Office of State Publishing is unable to provide the printing service. (See page 68)



Proposal Organization

Section 1: Administrative Response

Organize your proposal documents in the following order:

Attachment Number	Title of Section
	Cover Letter
	Table of Contents
1	Contractor Status Form
2	Darfur Contracting Act
	Small Business Certification (if applicable)
3	Disabled Veteran Business Enterprise Form Std. 843
4	Bidder Declaration Form GSPD-05-105
5	Contractor Certification Clauses
	TACPA Forms (if applicable)
10	Iran Contracting Act Form
11	California Civil Rights Laws Certification



Proposal Organization

Section 2: Technical and Cost Proposal

Organize your proposal documents in the following order:

Attachment Number	Title of Section
	Technical Approach
	Organizational Structure
	Relevant Experience and Qualifications
	Labor Hours by Personnel and Task
6	Client References
	Previous Work Products
7	Budget Forms
9	Commitment and Support Letters

See pages 49 through 54 for detailed application requirements.



Application Evaluation



Stage One- Administrative Screening

1. Energy Commission staff screens applications based on the criteria listed on page 70.
2. Criteria are evaluated on a pass/fail basis.
3. Applicants must pass all screening criteria to be considered for Stage Two.

Example Reasons for Failing Screening

- ▶ Application not submitted by the specified due date and time.
- ▶ Requested funding is outside of the specified minimum/maximum range.
- ▶ Project completion date beyond the specified agreement end date.
- ▶ Application contains confidential material.
- ▶ Application was not signed.



Stage Two – Technical Scoring

Proposals will be scored based on these elements:

Technical Approach	Budget and Cost-Effectiveness
Team Qualifications, Capabilities, and Resources	Cost Points
Previous Work Products	Match Funding
EPIC Funds Spent in California	

See pages 56-59 of the solicitation manual for details.



What is the Technical Scoring Scale?

% of Possible Points	Interpretation	Explanation for Percentage Points
0%	Not Responsive	Response does not include or fails to address the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable.
10-30%	Minimally Responsive	Response minimally addresses the requirements being scored. The omission(s), flaw(s), or defect(s) are significant and unacceptable.
40-60%	Inadequate	Response addresses the requirements being scored, but there are one or more omissions, flaws, or defects or the requirements are addressed in such a limited way that it results in a low degree of confidence in the proposed solution.
70%	Adequate	Response adequately addresses the requirements being scored. Any omission(s), flaw(s), or defect(s) are inconsequential and acceptable.
80%	Good	Response fully addresses the requirements being scored with a good degree of confidence in the Applicant's response or proposed solution. No identified omission(s), flaw(s), or defect(s). Any identified weaknesses are minimal, inconsequential, and acceptable.
90%	Excellent	Response fully addresses the requirements being scored with a high degree of confidence in the Applicant's response or proposed solution. Applicant offers one or more enhancing features, methods or approaches exceeding basic expectations.
100%	Exceptional	All requirements are addressed with the highest degree of confidence in the Applicant's response or proposed solution. The response exceeds the requirements in providing multiple enhancing features, a creative approach, or an exceptional solution.



Find Partners Through LinkedIn



The Energy Commission has created a user-driven LinkedIn Networking group page to help potential applicants connect, collaborate, and partner on proposals for research funding opportunities.

Participants may subscribe to the "California Energy Commission Networking Hub" by following this link: <http://bit.ly/CalEnergyNetwork>.



LinkedIn Networking Webinar

The LinkedIn Networking webinar is an opportunity for interested applicants to introduce themselves, explain their interest in this solicitation, and identify what they are seeking from potential project partners. Individuals are encouraged to participate and leverage their connections.

A one-hour, moderated webinar will be held on **Tuesday, October 16** at **2:00 p.m.**

Go to energy.webex.com and enter Meeting Number: **927 188 358**

No password is required.

Subscribe to this subgroup: <https://www.linkedin.com/groups/12144959/>

NOTE: Energy Commission staff will facilitate introductions. However, staff involved in development of the solicitation and scoring of proposals will not be present. Staff will not provide answers to technical questions. Questions must be submitted to the Contract Agreement Officer.

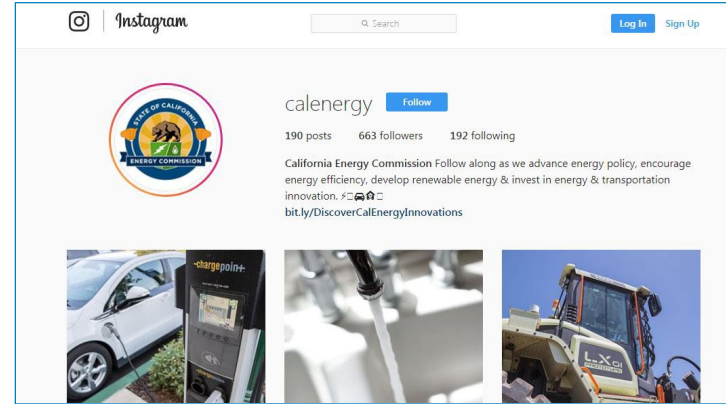




Connect with Us



Twitter



Instagram



LinkedIn





Questions and Answers

Please send all related questions in written form to:

Doug Harvey

Commission Agreement Officer

1516 Ninth Street, MS-18

Sacramento, CA 95814

(916) 654-4747

(916) 654-4423 (fax)

Douglas.Harvey@energy.ca.gov

Deadline to submit questions: **October 12 – 5:00 PM**



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